

# Confirm-IT2™

By  
CTL



## User Guide

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## INTRODUCTION

### **Overview of Confirm-IT2** (also referred to as “**CI2**”)

Confirm-IT2 (**CI2**) is an automatic appointment reminder system. It is similar to the original Confirm-IT product but does not include the graphical appointment scheduling calendar. It integrates with and compliments existing appointment scheduling calendar applications that do not offer an appointment reminder feature. CI2 automatically sends **Voice, Email and Text Message appointment reminders** to customers or patients who have scheduled appointments.

Customers receiving a phone call appointment “voice reminder” may be given the **option to interact** by pressing a dial pad digit to confirm, or cancel. If CI2 is connected to a phone system, it can transfer to a live person for re-scheduling.

Confirm-IT2’s main “**Yesterdays and Today’s Confirmations**” client PC display screen dynamically shows the status of appointment reminder activity and callout results within the last 48 hours. **Appointment Reports** and **Confirmation Reports** allow viewing of appointment reminder details selectable by a time and date range.

Confirm-IT2 retrieves appointment reminder data information by **Manual import** or by **Auto import** that performs a new import each time it detects a change made to the **appointment database file**. Confirm-IT2 builds an internal database from each appointment imported.

Only the pertinent appointment information is imported such as *First Name, Last Name, Phone Number, Email Address, Appointment Date, Provider, Start Time and End Time*.

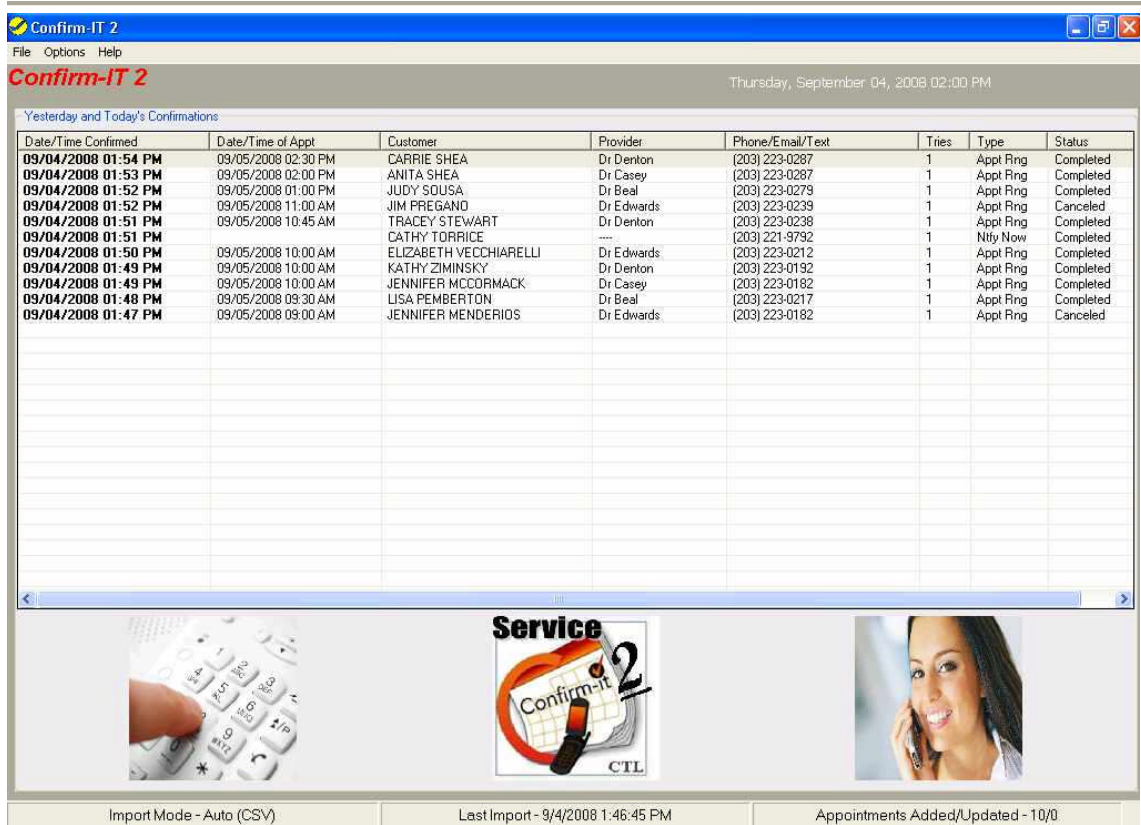
No other personal or medical information is present in the Confirm-IT2 internal database. The required reminder information must be presented by the existing appointment calendar application to CI2 in one of two ways:

- The Customer Database to be imported into Confirm-IT must be in Comma Separated Value (CSV), MDB / ACCDB, XLS, XLSX, DBC, DBF, DB, TAB, or ODBC format file accessible by the Confirm-IT user PC. Alternately, most existing scheduling software can perform a “Print to File” operation which Confirm-IT2 can convert. The Print to File must contain the required information in a structured form. ***This is a customized option per application and available after a sample file is tested by CTL.***

Confirm-IT2 Stand Alone consists of **two individual components**:

- Turn-Key Confirm-IT2 Linux Server Hardware, with **Pre-Installed Confirm-IT2 Application**
- Confirm-IT2 Client (User) Software for installation on User provided PC
  - *In small office environments it may be that the Confirm-IT2 client software will be installed on the same PC as the one running the existing appointment calendar schedule application.*

## Getting Started



**Figure 1** Confirm-IT2 “Yesterday and Today’s Appointments Main Screen

## GETTING STARTED, “The Basics”

### Assumptions


After the software has been installed on the Confirm-IT2 user’s computer, you can start Confirm-IT2 by clicking on Start and then clicking on Programs, Confirm-IT2 will be shown in the Programs menu. Click on Confirm-IT2 to start the application.

**NOTE:** *The very first time Confirm-IT2 is started, an installation Wizard presents a series of setup screens that guide you through the initial configuration. General information such as passwords and callout appointment reminder scheduling etc are entered at that time. Any subsequent required changes to the initial configuration entries may be made by persons who have the administrator level password.*

**This User Guide assumes that the Wizard procedure has already been performed by the user in conjunction with the Confirm-IT2 software installation personnel. It also assumes that all reminder voice messages have been recorded and Email/Text message content entered. Some of these procedures will be included in this manual in case changes are necessary.**

The complete Wizard setup and detailed Administration procedures are covered in the **Installation Manual**.

## Sign In

To start Confirm-IT2, click the on the desktop icon  if present, or you may select Confirm-IT2 from the Programs menu.



### NOTE:

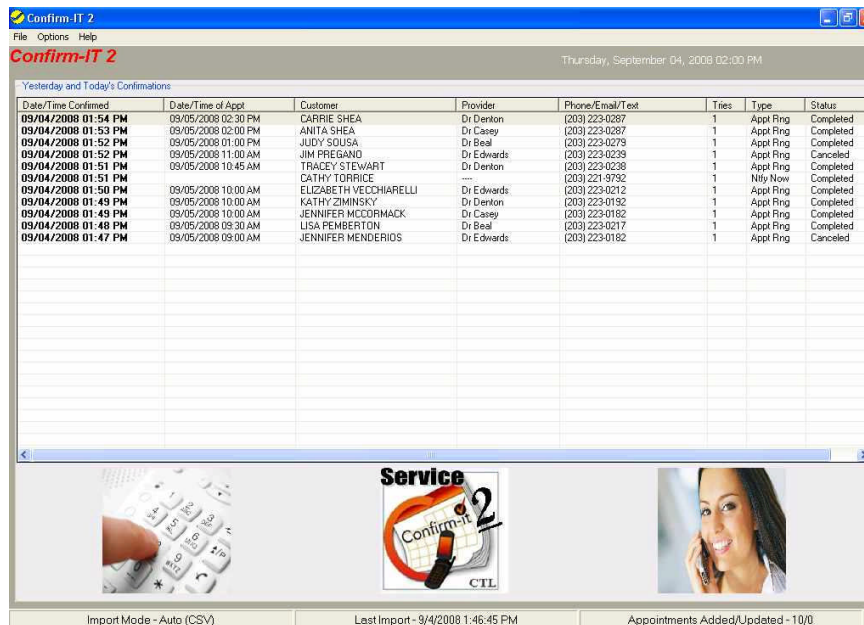
Several customized versions of Confirm-IT2 are available to fit the needs of different business types. Although the operation is the same, the screen examples in this User Guide may differ slightly from your version.

**Figure 2** Confirm-IT2 Password Sign in Screen

A Welcome dialog box will appear requesting that you enter a sign-in password. Position the cursor inside the entry field and type in the *factory set password CONFIRM2* or the new password set up by the software installer during the Wizard procedure. Click on the Sign-in button or press the Enter key.

**Note:** Passwords are case sensitive.

The following main screen will appear.



**Figure 3** Confirm-IT2 “Yesterday and Today’s Appointments Screen

## About The Main Appointment Confirmation Status Screen

**Personal Reminder Notepad for User**

**Familiar Pull-Down Menus**

**Callout, Email or Text Appointment Reminder Information Column Descriptions.**

Date/Time Confirmed	Date/Time of Appt	Customer	Provider	Phone/Email/Text	Tries	Type	Status
<b>09/04/2008 03:36 PM</b>	<b>09/05/2008 01:00 PM</b>	<b>JUDY SOUSA</b>	<b>Dr Beal</b>	<b>(203) 223-0279</b>	1	Cancel	Completed
09/04/2008 03:29 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Appt Rng	Completed
09/04/2008 01:54 PM	09/05/2008 02:30 PM	CARRIE SHEA	Dr Denton	(203) 223-0287	1	Appt Rng	Completed
09/04/2008 01:53 PM	09/05/2008 02:00 PM	ANITA SHEA	Dr Casey	(203) 223-0287	1	Appt Rng	Completed
09/04/2008 01:52 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Appt Rng	Completed
09/04/2008 01:52 PM	09/05/2008 11:00 AM	JIM PREGAND	Dr Edwards	(203) 223-0239	1	Appt Rng	Canceled
09/04/2008 01:51 PM	09/05/2008 10:45 AM	TRACEY STEWART	Dr Denton	(203) 223-0238	1	Appt Rng	Completed
09/04/2008 01:51 PM	09/05/2008 10:45 AM	CATHY TORRICE	---	(203) 221-9792	1	Ntly Now	Completed
09/04/2008 01:50 PM	09/05/2008 10:00 AM	ELIZABETH VECCHIARELLI	Dr Edwards	(203) 223-0212	1	Appt Rng	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	KATHY ZIMINSKY	Dr Denton	(203) 223-0192	1	Appt Rng	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	JENNIFER MCCORMACK	Dr Casey	(203) 223-0182	1	Appt Rng	Completed
09/04/2008 01:48 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Appt Rng	Completed
09/04/2008 01:47 PM	09/05/2008 09:00 AM	JENNIFER MENDERIOS	Dr Edwards	(203) 223-0182	1	Appt Rng	Canceled

**Bold** information indicates **today's** activity, Regular text displays yesterday's activity.

Indicates *Appointment, Appointment Range, Appointment Date, Reschedule, Birthday, Notify Now, Provider Canceled or Inactive* type of notification.

Import Mode - Auto (CSV) **afc** Last Import - 9/4/2008 1:46:45 PM Appointments Added/Updated - 10/0

Appears only if required formatting by automatic file conversion CTL customized option is present.

\* If **Auto** Import Mode is selected, Confirm-IT2 will poll the appointment file every 30 seconds to check for new client entries, changes to existing client contact data or appointment date/time changes.

If input mode is set to **Manual**, the user will need to perform an import each time the appointment database file has changed or a new appointment has been added.

- If the Import mode is set to **Manual**, this area shows the last time an import was completed.
- If the Import mode is set to **Auto**, this will show the last time Confirm-IT2 detected that the appointment database file has been modified and completed a new import.

\* *The Import Mode is determined during the installation of Confirm-IT2.*

This area indicates the amount of appointments that were **added** to the callout queue during the last import. (If for example only a phone number changed during the most recent import, no appointments would be added).

Appoint"  
"Cancel"  
"Birthday"  
"Close"  
"Close"  
"Inactive"  
"Re-Sched"  
"Ntly Now"  
"Appt Rng"  
"Appt Dat

**Figure 4** Main Appointment Status Screen

## Using Confirm-IT2 (Import Modes)

The amount of involvement in the daily operation of Confirm-IT2 will depend on the Mode of operation that was selected during the software setup.

Most likely, **Auto Mode** was selected during the installation and the initial Import information fields have been set up, so there is not much involvement other than monitoring the dynamic Main screen and possibly running some reports. Confirm-IT2 scans the *appointment database file* every 30 seconds to see if there were any changes or additions since the last time it performed an automatic import. (see **Figure 4**)

If **Manual Mode** was selected a manual Import will need to be performed each time the *appointment database file* of the existing appointment scheduling application has been changed i.e. appointment added or an appointment date/time has been changed. After the initial import has been completed, the template information from the previous import such as file name and location and the column positions of the required data fields will still be present in the **Import Appointment Manager** screen. **There should be no need to change any of this information.** By clicking the **Import** button, the latest version of the *appointment database file* will again be imported into Confirm-IT2 after clicking the **Save** button.

Name and location of *appointment database file*

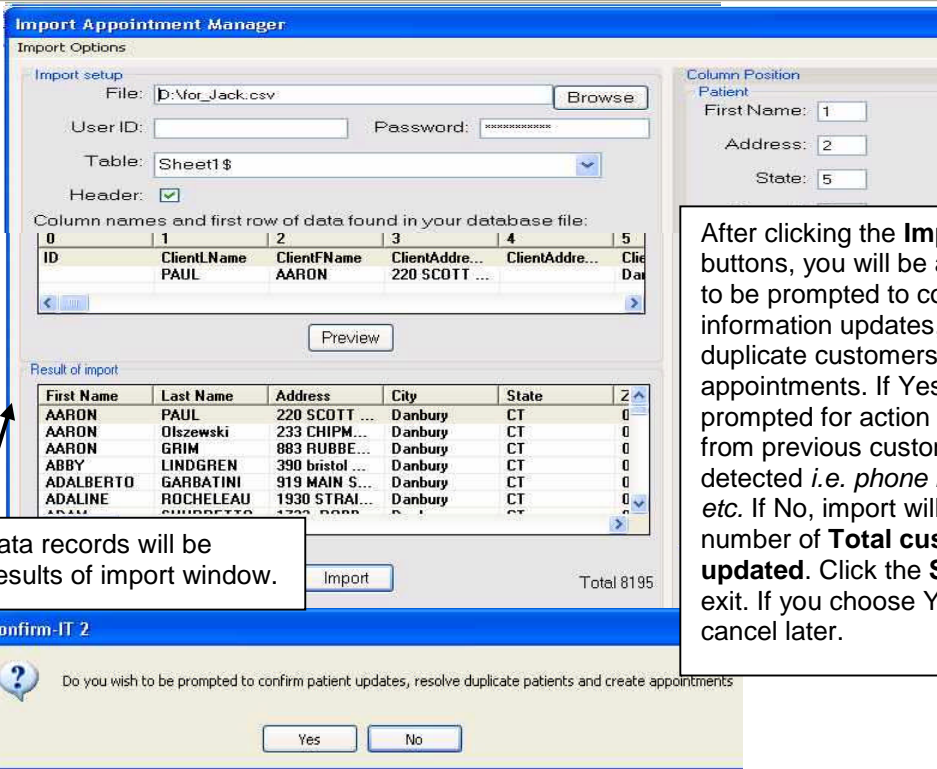
NOTE: If the file is in CSV format, some fields will not be

Database column number positions from last import.

See Note on next page

Depending on your existing scheduling application, use only one date/time format set (A) or (B). DO NOT MIX

**Figure 5** Import Appointment Manager Manual Import



After clicking the **Import and Save** buttons, you will be asked if you want to be prompted to confirm customer information updates, resolve duplicate customers and create appointments. If Yes, you will be prompted for action if any changes from previous customer records are detected *i.e. phone number change etc.* If No, import will run and show number of **Total customers updated**. Click the **Save** button to exit. If you choose Yes, you may cancel later.

The imported data records will be shown in the Results of import window.

**Figure 6 Manual Import Interaction Window**

**\* NOTE:** In most database files, there is a key (index/or ID) field that contains a **unique** (usually sequential) number that is assigned to each **appointment** entry. The column number of this field should be entered in the **App. ID Column Position** box. If the ID is entered and a date change is made to an appointment, CI2 can detect that it is only a date change and not a new appointment.

## Viewing and Printing Confirm-IT2 Reports

Confirm-IT2 provides 3 major report types: Confirmation, Appointment and Inactivity. These reports are viewed at the Confirm-IT2 User PC and can be printed.

The **Appointment Report** shows pending callouts and callout results for a specified date and time period, set in the **Report range** section of the screen. All customers are selected by default but you may select certain customers and disregard others.

*If for some reason an imported appointment reminder needs to be Cancelled or marked for Deletion and deleted from the Confirm-IT2 Internal database, there is an option within the Appoint Report screen to do so.*

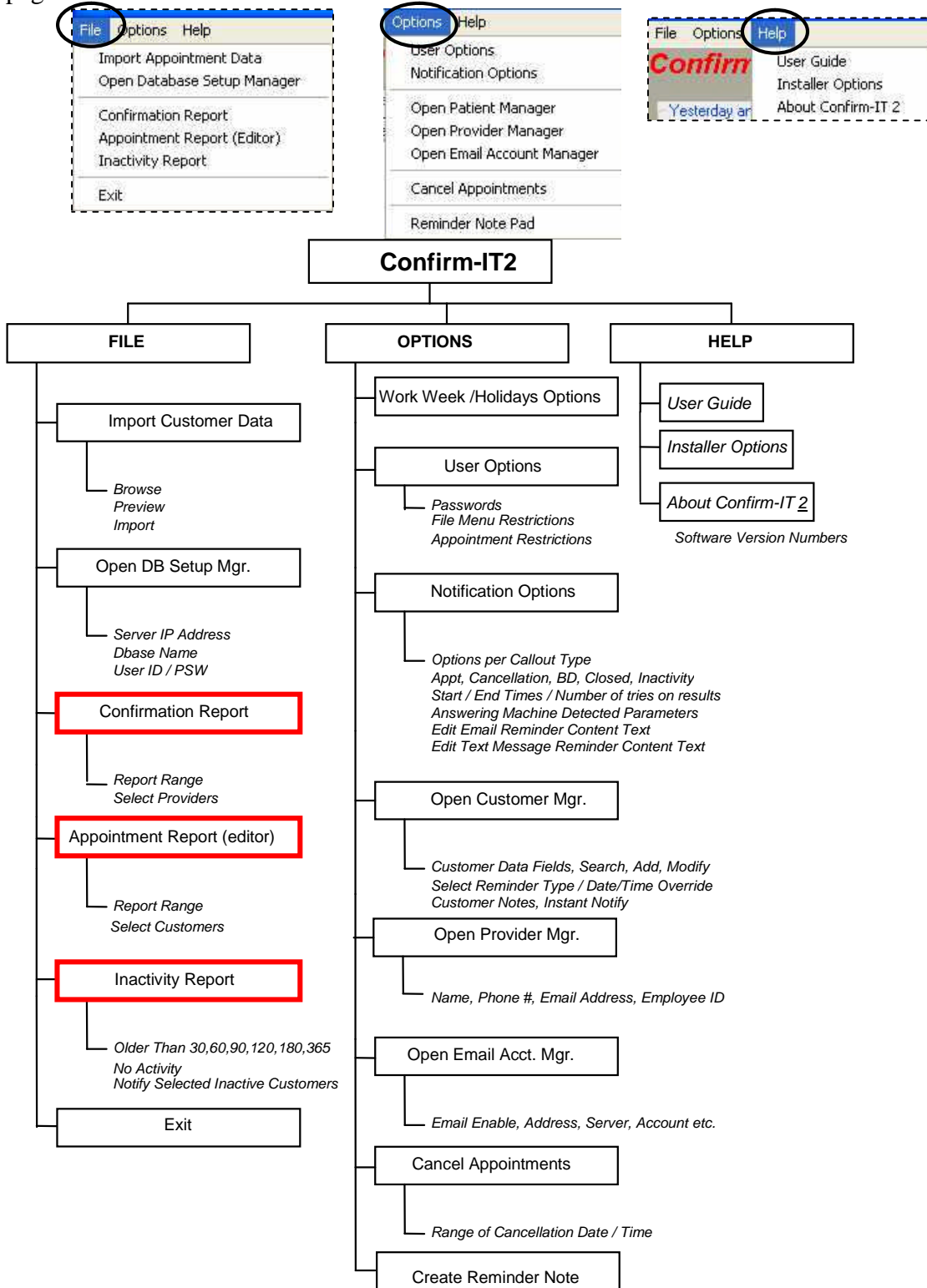
(See Appointment Report **Figure 9 and 9a**)

**IF A SCHEDULED APPOINTMENT HAS BEEN DELETED FROM THE EXISTING SCHEDULING SOFTWARE DATABASE FILE AND HAS ALREADY BEEN IMPORTED INTO CONFIRM-IT2, THE NOTIFICATION CALL IS STILL PENDING IN THE CONFIRM-IT2 SERVER. IT MUST BE MANUALLY DELETED OR CANCELLED FROM CONFIRM-IT2 ALSO TO STOP THE NOTIFICATION!**

**For any appointments that were deleted manually from the Confirm-IT2 internal database, you can limit the view to show those alone.**

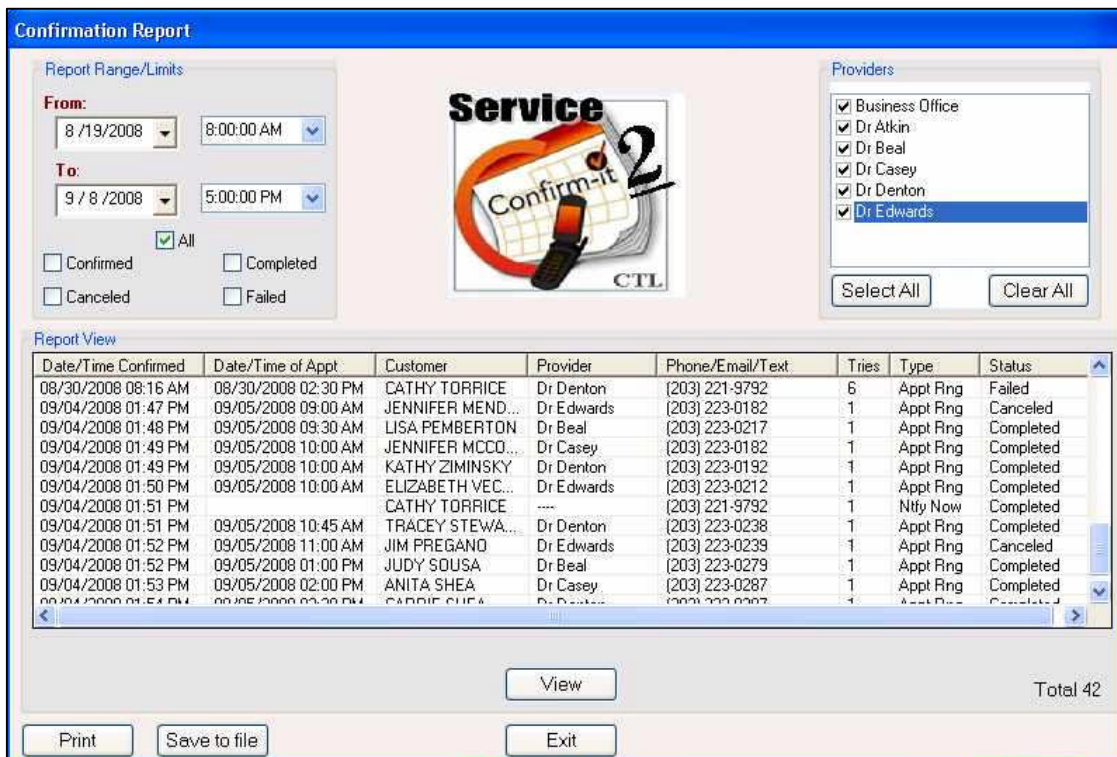
## Drop Down Menus

In the upper left of the screen are the pull down menus that will be explained in the next pages.



**Figure 7** Confirm-IT2 Pull Down Menu Tree Diagram

## Confirmation Report



**Figure 8 Callout Confirmation Report**

The Confirmation report shows the callout results for a specified date and time period, set in the **Report range** section of the screen.

Callout results can be set to All or you may elect to only see call results for **confirmed**, **cancelled**, **completed** or **failed** callouts in the **Status** column. Additional status results:

**Busy** – *Called line busy* **Rna** - *(Ring no answer)* **Mach** – *(Answered by a machine)*

**Tran** – *(Called party pressed “0”, Transferred to extension)* **Reor** - *(Reorder tone)*

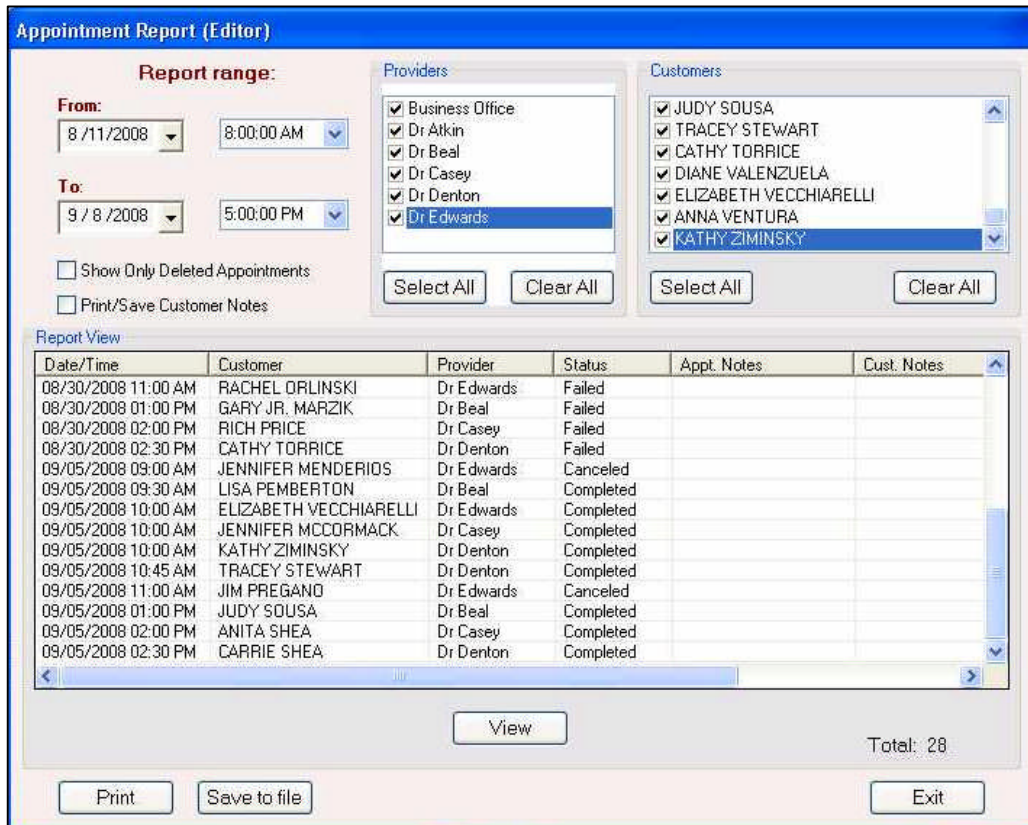
If the called party presses a digit for Cancel, Confirm or Transfer, the dialed digit will also show in the printed report as long as the printer is set to Landscape print.

The **Customer** column displays the name of the person the callout was directed to and the **Phone/Email/Text** column displays the phone number called or the Email/Text address.

The **Tries** column shows how many times the callout was attempted. **If the number of tries is a high value, it may be indicating line busy or invalid phone number conditions.**

As shown in the **“Callout Options Email / Text Message Content”** section of this manual, there are several different call types. The **Type** column indicates which type was associated with each callout.

## Appointment Report

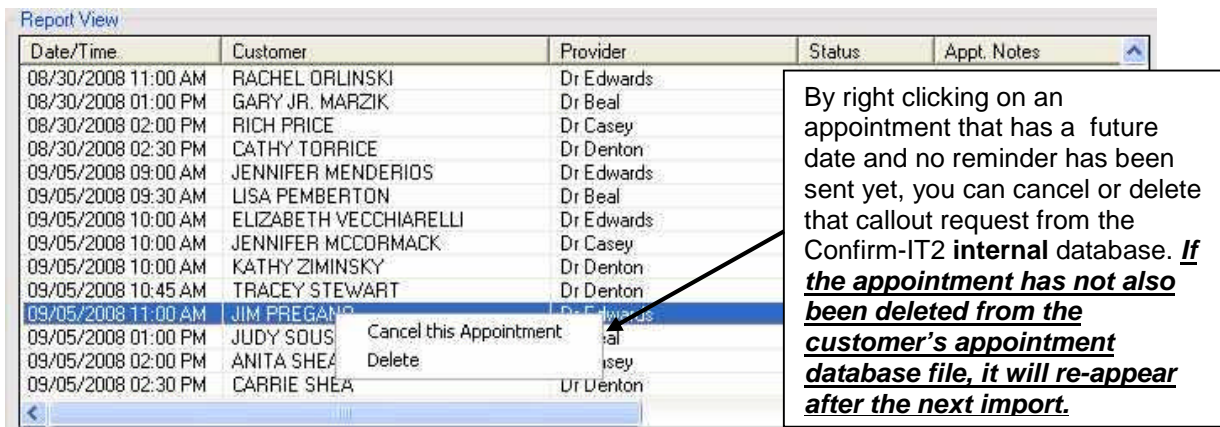


**Figure 9 Appointment Report**

The Appointment report shows the callout results for a specified date and time period, set in the **Report range** section of the screen. All customers are selected by default but you may select certain customers and disregard others.

For any appointments that were deleted manually from the Confirm-IT2 internal database, you can limit the view to show those alone.

The report can be saved as a text file or printed to provide a hard copy.



**Figure 9a Cancel or Delete Appointment/Notification in Confirm-IT2**

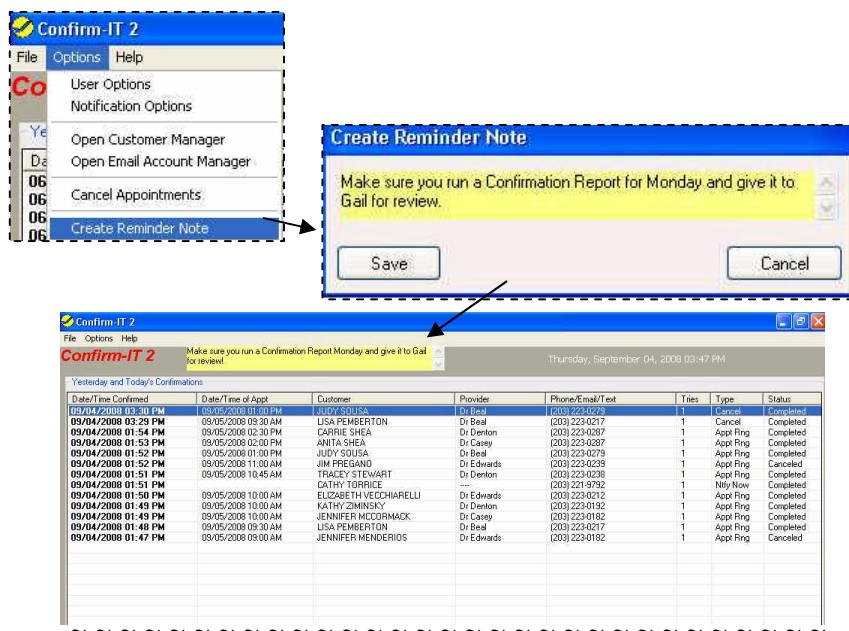


If the recorded **Appointment Reminder** message includes: **“to cancel this appointment, press 2”**, when the called party presses the digit 2, it will show as an **appointment cancelled** by customer.

If the Confirm-IT2 system was instructed to send out appointment cancellation callouts and/or Email/Text messages, those appointment cancellations will show as **cancel completed**. This is true for a date range cancellation by the system or for the individual cancel request explained in the Appointment Report section under **Figure 9**.

## Reminder Note Pad

A reminder note can be shown in the upper center of the Main **Yesterday and Today’s Confirmations** screen. From the pull down Options menu, select Create Calendar Note to either create a note or add more text. A yellow background note area will appear to allow text input and presents options to save or cancel.



**Figure 11** Personal Reminder Note Pad For the User

## Recording Notification Messages

Confirm-IT 2  
File Options Help  
Confirm-IT 2 Make sure you run a Confirmation Report Monday and give it to Gail for review! Thursday, September 04, 2008 03:47 PM

Yesterday and Today's Confirmations

Date/Time Confirmed	Date/Time of Appt	Customer	Provider	Phone/Email/Text	Tries	Type	Status
09/04/2008 03:30 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Cancel	Completed
09/04/2008 03:29 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Cancel	Completed
09/04/2008 01:54 PM	09/05/2008 02:30 PM	CARRIE SHEA	Dr Denton	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:53 PM	09/05/2008 02:00 PM	ANITA SHEA	Dr Casey	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 11:00 AM	JIM PREGANO	Dr Edwards	(203) 223-0239	1	Appt Ring	Canceled
09/04/2008 01:51 PM	09/05/2008 10:45 AM	TRACEY STEWART	Dr Denton	(203) 223-0238	1	Appt Ring	Completed
09/04/2008 01:51 PM		CATHY TORRICE	----	(203) 221-9792	1	Nfy Now	Completed
09/04/2008 01:50 PM	09/05/2008 10:00 AM	ELIZABETH VECCHIARELLI	Dr Edwards	(203) 223-0212	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	KATHY ZIMINSKY	Dr Denton	(203) 223-0192	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	JENNIFER MCCORMACK	Dr Casey	(203) 223-0182	1	Appt Ring	Completed
09/04/2008 01:48 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Appt Ring	Completed
09/04/2008 01:47 PM	09/05/2008 09:00 AM	JENNIFER MENDERIOS	Dr Edwards	(203) 223-0182	1	Appt Ring	Canceled

To delete the note completely, double click on the note at the top center of the **Yesterday and Today's Confirmations** screen.

## Help Menu

The pull down Help menu provides access to:

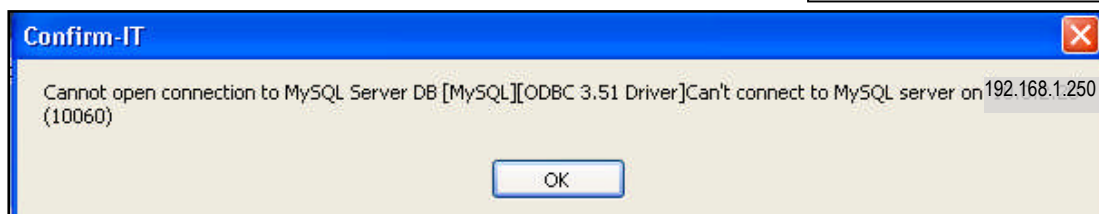
- **Confirm-IT2 User Guide** - can be viewed from this menu.
- **Installer Options** – A link for the installer to connect to the Advanced programming screens of the Confirm-IT2 Server. It has its own viewer and will automatically connect to the IP address of the server. Access to this area requires the Installer Level password.
- **About Confirm-IT2** – The information box shows two software version numbers. The top number refers to the **User software** running on this PC. The bottom version number refers to the Linux **Confirm-IT2 Server software** version of the server you are connected to.



**NOTE:** If at any time, the **bottom version number is not present, it means that there is a problem with the data communication between the User PC and the Server.**

The connection error message Shown below will also appear indicating that the connection has gone away.

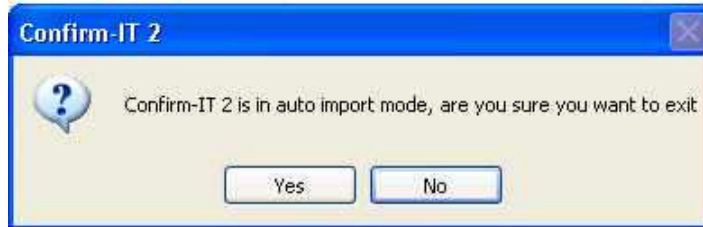
After determining the cause of the communication interruption it may be necessary to exit CI2 and then restart it.



**Figure 12 About Confirm-IT2 & Software Version**

## Exit Confirm-IT2

To exit the Confirm-IT2 application, click the File menu and click Exit. If the Import Mode is set to Auto, the following warning will appear. When Confirm-IT2 is started again, it will remember if it was in the Manual or Auto Import mode.



**Figure 13** Exit Confirmation For Auto Import Mode

## User Options

Confirm-IT2 has two sign in password levels: Administrator and User. The **User Options** screen parameters determine which options the User level sign in password will be allowed to access. Most of the options are allowed for the User level during installation. The Administrator determines which options should be restricted for the User level password. The Administrator password entry will be required for access this menu. **User level attempts will get an error message.**

The User Options allow/deny access list includes:

**File Menu Options** – *Confirmation Report, Appointment Report, Inactivity Report*

**Options Menu** – *User Options, Notification Options, Customer Manager, Email Account Manager, Cancel Appointments, Create Reminder Note*

**Appointments** – *Delete, Cancel and Notify Customer*

**Other** – *Business Name, Phone Number, Business ID, Appointment Type*

**If you are restricted from any of these options and believe that you should have access, contact the Confirm-IT2 system administrator and request that the User level password be allowed access to that option.**

## Notification Callout Options

Most of the Notification options were entered while running the wizard. Additional options such as number of rings, busy attempts, answering machine detections etc are modified here for each type of callout. Usually, these settings can be left at their default value. Notification types are:

- Appointment** -- *Reminder call and Email/Text Msg. to customers who have scheduled appointments.*
- Cancellation** -- *Calls out and plays user recorded Cancellation message and Email/Text Msg. to scheduled customers of provider(s) (staff) if provider is not able to work etc. Provider(s), times /date range and activation are set in **Calendar/Cancel Appointments** menu. This may also be activated remotely on a **Provider ID** basis via the **Telephone User Interface (TUI)**.*
- Birthday** - - - *Call and Email/Text Msg. to customers that have birthday date entries in their profile and have the **Birthday Phone Reminder** check box enabled and plays the generic user recorded **Birthday** message..*
- Close (customer)** -- *Call and Email/Text Msg. to all scheduled customers. Plays the user recorded **Business Close** message. The callouts are activated via the **TUI** for today or tomorrow's appointments.*
- Close (provider)** -- *Call and Email/Text Msg. to the business staff whose information was entered in the provider manager Menu and plays the user recorded **Business Close Provider** message.*
- Inactivity** -- *Call and Email/Text Msg. all inactive customers specified in the **Inactivity Report** and plays the user recorded **Inactive Customer** message. Follows parameters & activation of report menu.*
- Notify Now** -- *Immediately sends Call and Email/Text Msg. of the company's recorded notification message advising that a service is available now.*
- Reschedule Reminder** -- *Automatic date triggered "Tickler" Call and Email/Text Msg. friendly reminder to advise customer to call in to schedule their next appointment.*

**Figure 14** Typical Notification Option Parameters

To avoid making reminder calls on holidays the **Adjust for Off Days/Holidays** feature forces Confirm-IT to look ahead to see if tomorrow is a holiday or business off day. It will force the system to make those reminder calls now, prior to those days. Example – Christmas is on Thursday **and** Friday is a work day. Reminder calls for Friday will go out on Wednesday the day before Christmas.

## Options

**Start Time** – System wide time of day that callouts for the selected callout type will start.

**End Time** – System wide time of day that callouts for the selected callout type will no longer be allowed.

**NOTE:** Start & End Times can be overridden per customer in the Customer Manager window

**Days Before Appointment** – The number of days prior to the actual appointment to send reminders.

**Appointment Confirmation Feature** – Check this box if you want to instruct the called party to verify that they heard and accepted their appointment reminder voice message by pressing the digit 1. If the called party wishes to cancel the appointment, they may press the digit 2 on their telephone dial pad.

**NOTE:** The 2 part Appointment Reminder Message **MUST BE RECORDED** to use this option.

**Transfer Feature** – Used only when Confirm-IT server is connected to a single line interface of a phone system that provides a hook flash transfer to the extension specified in the **Transfer Number** field.

**Busy Retry Attempts** – If a line busy is received, this sets the number of times a callout is tried for the selected callout type before it is considered unsuccessful and stops calling this customer.

**RNA Attempts** – If a ring no answer (RNA) condition exists for the callout, this value sets the number of tries made for the selected callout type before being considered unsuccessful and stops calling.

**Wait before Busy Retry** – The number of minutes to wait before re-trying a previously busy callout.

**Wait before RNA Retry** – The number of minutes to wait before re-trying a previous Ring No Answer.

## Answering Machine

**Enable Detection** – When the callout is answered, apply logic to determine if it was an answer machine.

**Leave message If Detected** – If answer machine is detected, play the **Answering Machine Message** and consider the call successful.

**NOTE:** The Answering Machine Message **MUST BE RECORDED** to use this option.

**Retry Call If Detected** – If an answering machine is detected, play the **Answering Machine Message** and then call back a second time for an attempt to get a live person. Only 1 message is left on machine.

**Repeat Message** – The number of times the **Answering Machine Message** is repeated to make sure the whole message in its entirety is recorded by and stored on the customer's answering machine.

## Text to Speech (Optional Feature)

**Enable TTS** – Activates text to speech if that option was purchased.

**Auto Text Selection** – The text fields in brackets contain imported or entered system stored information that can be inserted as smart text into TTS or Email content.

**Email/Text Message** – Enter Subject, and Body text for Email and Text Message content.

## Recording Notification Voice Messages

As previously discussed in the Callout Options, Confirm-IT can do more than just remind customers of their scheduled appointment by calling and playing a reminder message and / or sending cellular text messages and Email.

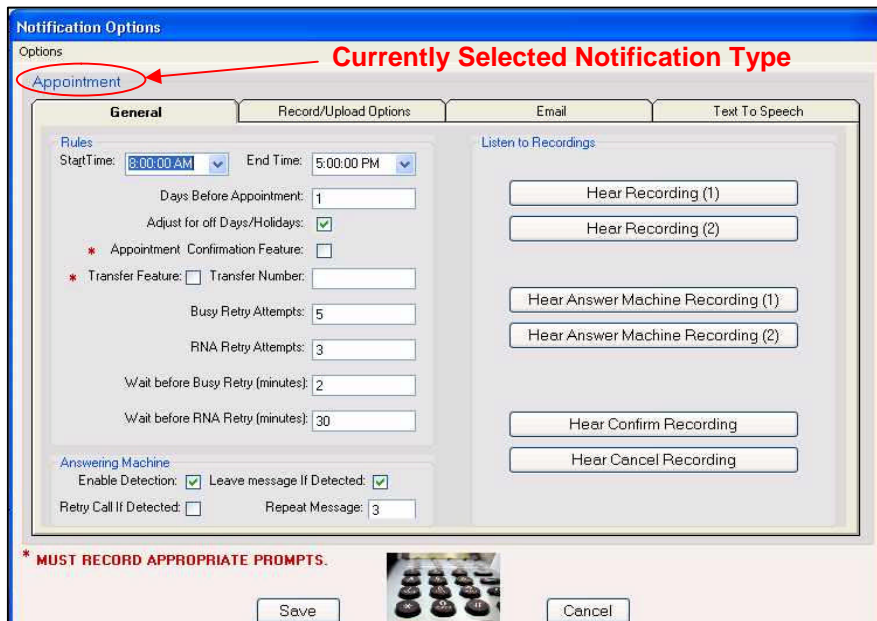
Confirm-IT can also:

1. Notify customers their appointment is cancelled due to a personnel problem.
2. Notify customers and employees of business closure due to weather etc.
3. Send a Notify Now message on demand.
4. Send a Reschedule reminder message.
5. Send a birthday message (with special offer) to customers.
6. Send a “we miss you” message to customers not seen in a while.

In order to use the basic appointment reminder and the other features listed above, a voice message must be recorded by the administrator for each message type. These voice messages are recorded using Confirm-IT’s recording **Graphical User Interface (GUI)** with the PC’s sound card, microphone and speakers or using a conventional telephone line to access the **Telephone User Interface (TUI)**. After calling in and connecting to the Confirm-IT TUI, a prompt menu will provide dial pad digit choices and guide you through the different voice recording steps.

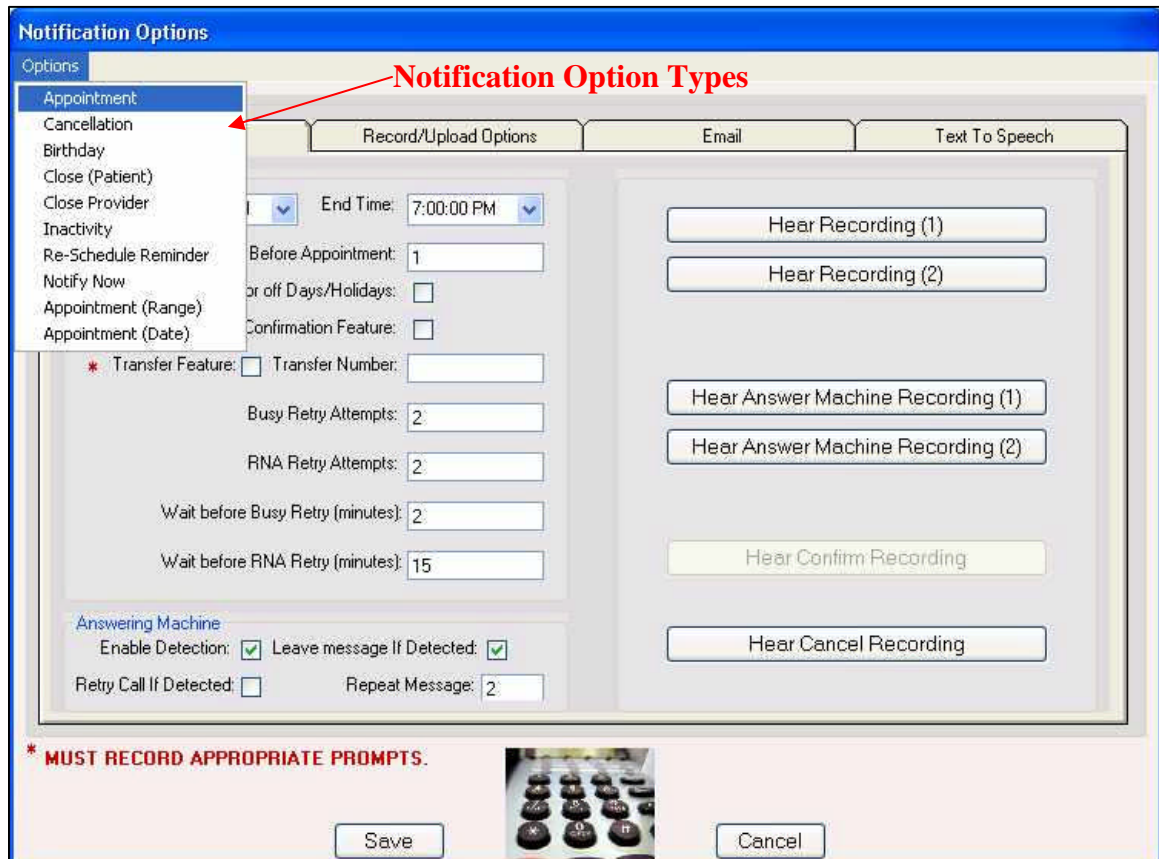
### Using The PC GUI To Recording Notification Voice Messages

When the Confirm-IT user software is installed on a PC that has a sound card, the outgoing reminder notification messages may be recorded using a microphone. It is recommended that a high quality analog or USB type microphone be used. The recording GUI is accessed by selecting *Notification Options* from the **Options** menu.



**Figure 16** Appointment Options Message Playback Screen

The four **Tabs** labeled **General**, **Record/Upload Options**, **Email** and **Text to Speech** appear for each of the Notification Options when selected from the drop down Options box. Recording procedures are identical for each of the notification types although some types require single part recording and others require two parts. Message examples for each recording are provided as a guideline. We will go through the procedure for creating or importing Appointment option recordings. Once you understand how to record, play back and save these recordings, you can repeat the procedure for each of the other Notification Option types.



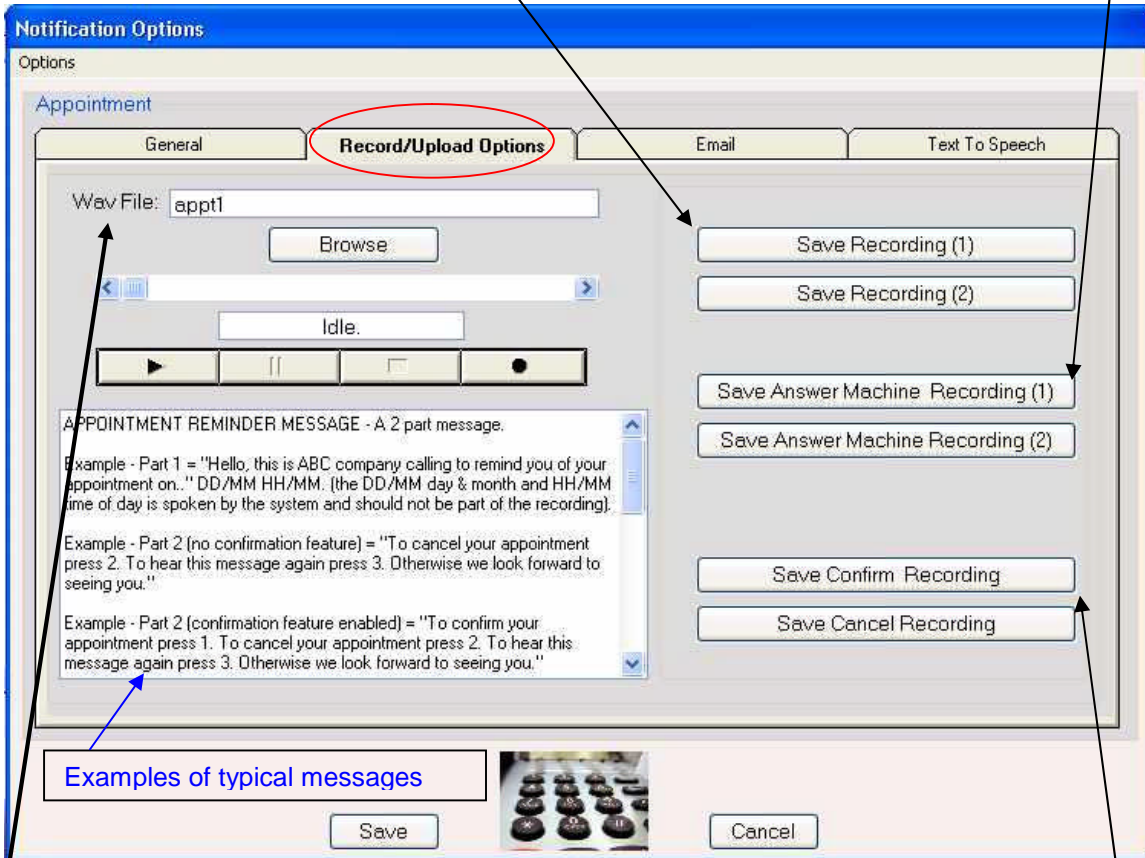
**Figure 17 Notification Option Types Pull Down Menu**

Some of the Notification Types require two part messages. The wording for the **second part will vary** depending on if the **Appointment Confirm Feature**, **Appointment Cancel** or **Transfer Feature** to phone system extension by **dialing “0”** options have been enabled in the **Callout Options** screen or if you offer the **Cancel Appointment** option (see **Figure 17**).

**Example: “To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. To transfer to our appointment coordinator press 0, otherwise we look forward to seeing you.”**

Wording examples for the different combinations of these dial options are shown in the Record/Upload Options TAB screen for each Notification Option Type. As will be shown in the example Answer Machine Message wording, these options should not be offered since it is not a live connection to the called party.

This example is the Appointment Message which has two parts [Save Recording (1)] and [Save Recording (2)]. The Answer Machine Recording also has 2 parts.



**Figure 18** Record/Upload Options TAB Screen

In the **Wav File** entry window you must type a temporary file name. Alternately, you may type a path and name to save the recording there for future use. Example - **C:\messages\appt1.wav** You may also click the Browse button to search for an existing WAV file to use as one of the recordings.

If the Confirm Appointment (*dial digit 1*) and/or the Cancel Appointment (*dial digit 2*) options are enabled, these recorded messages will play after the associated option digit is dialed by the called party. They are typically just closing comments such as:  
 "Your appointment has been confirmed and we look forward to seeing you."  
 or  
 "You have cancelled your appointment. Please call 555-1212 to reschedule."



**TO RECORD**

After entering a file name, click anywhere on the screen to activate the Play/Pause/Stop/Record control bar. Click the **Record** button to begin recording into the microphone. When finished, press the **Stop** button.

**IMPORTANT NOTE!!** If you selected an existing Wav File using the Browse button, you will record over that existing file!

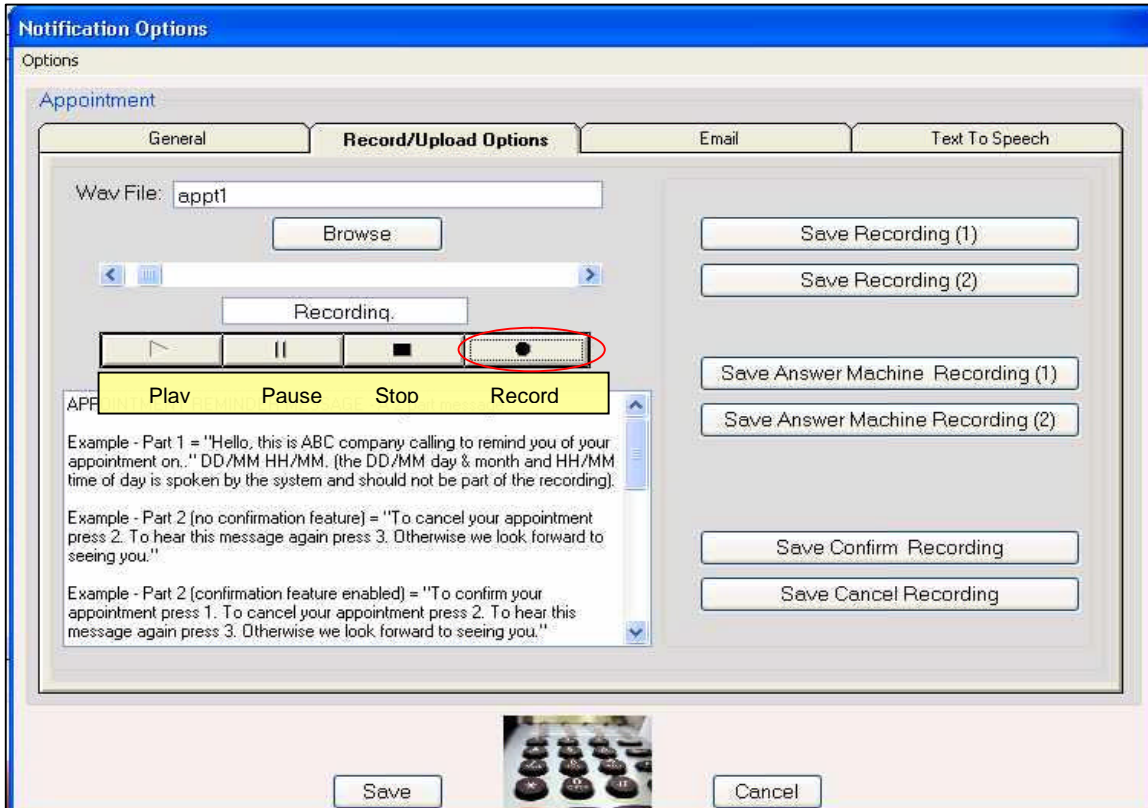
**TO PLAY**

Click the Play button to hear the recorded message through the PC speakers.

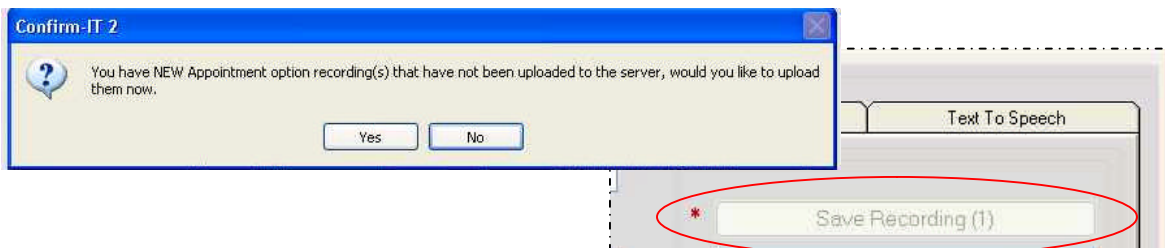
**TO SAVE**

Click the appropriate Save Recording button on the right side of the screen. A **red asterisk** will appear to the left of the save button and the button will be dimmed to indicate the message was saved. This only saves the recording as a temporary local file.

*The recording is not permanently uploaded and saved to the Confirm-IT server until the lower left Save button is clicked on one of the options screens. You can move between Tabs and select other Options types and a message box will remind you that the upload save to the server has not been done.*



**Figure 19** Using the Record Button to Record a Message



The **General** TAB allows you to play back existing recordings that have already been uploaded and saved to the Confirm-IT server. This is the actual message that will be heard by the person receiving the recorded message.

If the recording does not exist for the selected Notification Option, the **Hear Recording** key will be dimmed.

The screenshot shows a window titled "Notification Options" with a sub-header "Options". Below this is a "Cancellation" section. The main area is divided into four tabs: "General" (selected), "Record/Upload Options", "Email", and "Text To Speech".

**Rules**

Start Time: 8:00:00 AM (dropdown) End Time: 6:00:00 PM (dropdown)

Days Before Appointment: 0 (input field)

Adjust for off Days/Holidays:

\* Confirmation Feature:

\* Transfer Feature:  Transfer Number: (input field)

Busy Retry Attempts: 5 (input field)

RNA Retry Attempts: 3 (input field)

Wait before Busy Retry (minutes): 2 (input field)

Wait before RNA Retry (minutes): 30 (input field)

**Answering Machine**

Enable Detection:  Leave message If Detected:

Retry Call If Detected:  Repeat Message: 3 (input field)

**Listen to Recordings**

Hear Recording (1) (button)

Hear Recording (2) (button)

\* MUST RECORD APPROPRIATE PROMPTS.

Save (button) [Image of a telephone keypad] Cancel (button)

**Figure 20 Listen to Messages Stored in the Server**

**IMPORTANT NOTE:** If no message has been recorded for a certain Notification Option and a notification callout for that call type is made, the default system message will be played to the called party!

Example: The Reschedule Reminder Message has been enabled in the Advanced Tab of a customer's profile. If no reschedule reminder greeting message has been recorded in the Notification Options, the called party will hear "*The reschedule reminder message has not been recorded.*"

## Customer Manager

The Customer Manager section allows you to search and select a particular customer's contact information within the Confirm-IT2 internal database. In the Customer Manager you can display or modify a customer or patient's appointment reminder profile settings.

### Searching For A Customer Appointment Profile

Open the Customer Manager screen by selecting Customer Manager from the pull down **Options** menu.

**Customer Manager**

**General** | Advanced

\* First Name: SHELIA \* Last Name: FLAMENGO \* Required Fields

Address: 93 WOODBINE STREET City: Danbury Search Clear Entry

State: CT Zip: 02798

Family Members:

Phone #: (203) 223-2138  Reminder

Alt. Phone #:   Reminder

Email Address:   Reminder

Text Message:   Reminder

Enable "Notify Now!" Cancel "Notify Now!"

By Email/Text  By Phone

Customer Notes:  
Shelia is allergic to aspirin.

Delete	First Name	Last Name	Address	City	State
<input type="checkbox"/>	STEVE	FLAHERTY	930 WOOD...	Danbury	CT
<input type="checkbox"/>	SHELIA	FLAMENGO	93 WOODBI...	Danbury	CT
<input type="checkbox"/>	LISA	FLAMMIA			
<input type="checkbox"/>	MICHELLE	FLAMMIA			

Add Modify Delete

Save Cancel Total 8185

Miscellaneous details about each customer may be entered here.

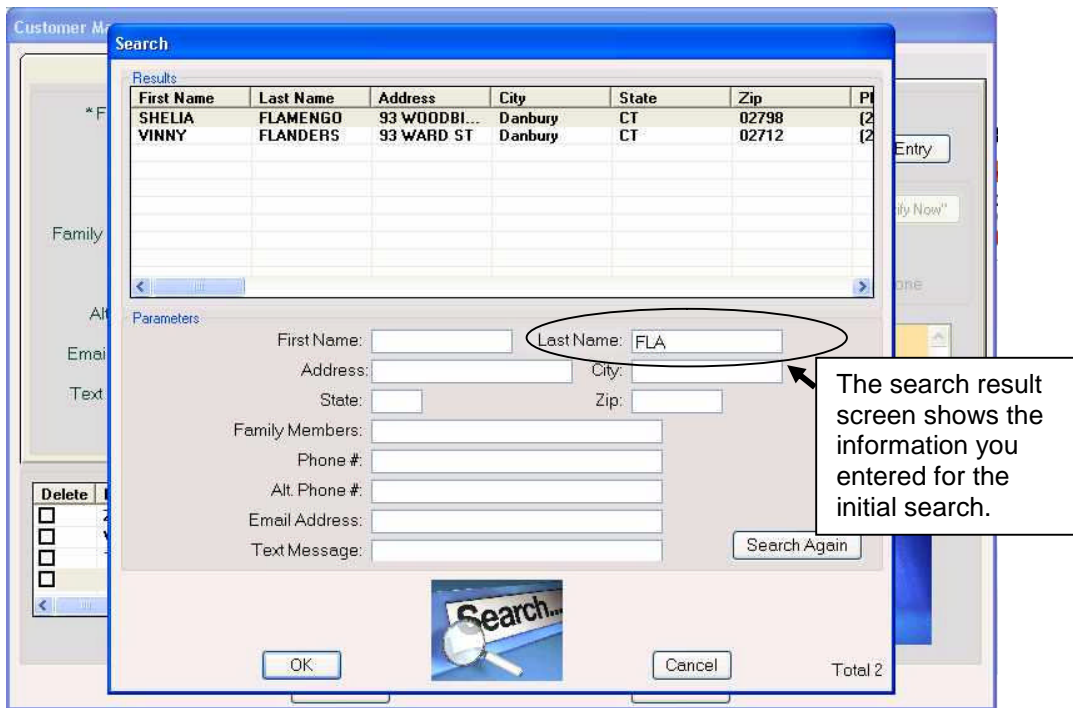
The Reminder box for any imported fields will automatically be checked. You can add additional information that is not present in the imported **appointment database file**.

**Figure 21** Customer Manager Screen

To locate a specific customer, you can perform a search by entering some known information about that person. By entering a phone number or the first few letters of the last name and then clicking the Search button, Confirm-IT2 will find all matching records. If multiple matches are found for the information you entered, a secondary screen will appear with a list of the matching customer records.

### Refine Search, Search Again

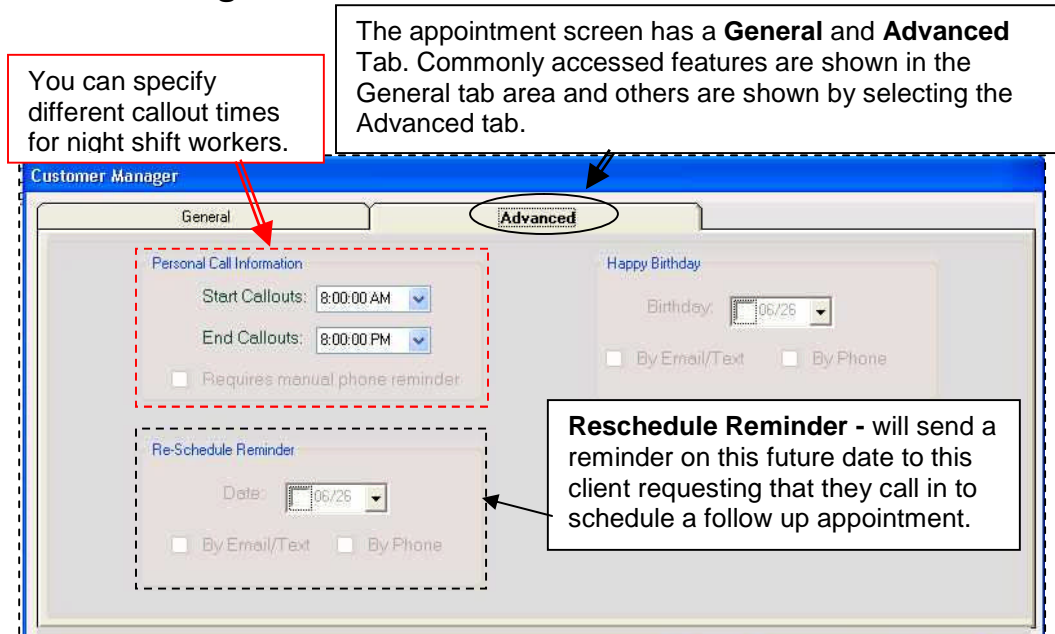
When entering an appointment, if the information entered locates multiple matches for a previous patient or customer, a secondary search screen appears. It shows what key words were entered and allows you to change or add additional information to search on and search again to refine the search.



**Figure 22 Search Results – Search Again**

If the name of the person you were searching for appears in the Search **Results** list, you may either double click on that line or highlight the line and click the **OK** button. If none of the Results displayed are the one you are searching for or if a large number of records are displayed, you may narrow the search by entering additional key information. To repeat the search click on the **Search Again** button.

**Customer Manager Advanced Tab Screen**



**Figure 23 Customer Manager Advanced Tab Options**

## Notify Now

Different from a Scheduled reminder, clicking the Enable **Notify Now** button plus the **Save** button will trigger a notification to the media selected in the check boxes below it (  Email/Text  Phone).

It is designed to notify a person immediately that a service such as an available table or golf tee time etc. has become available.

If Confirm-IT2 is connected to analog ports of a phone system, the optional Transfer Feature can be utilized to flash the line and connect to a live attendant.

**NOTE** – The single special “Notify Now” company prompt must be recorded using the PC Message Recording Graphical User Interface with a microphone or using the Telephone User Interface (TUI).

Restaurant Example:

*“Your table is ready, please come to the hostess desk, thank you.”*

Veterinarian Example:

*“Your pet is ready to be picked up, please call us at 555-1212 between 3 and 5 PM”*

**Figure 24** “Notify Now” Progress Indication

Opening the appointment window after enabling Notify Now will show a progress indication here.

- **Notify Now Pending**
- **Complete dd/mm/yy hh/mm**
- **Fail** (not answered)

**NOTE:**

Since Notify Now should be a single callout, the Call Out Options for the “Notify Now” tab settings are as follows:

- Busy Retry Attempts = 2
- RNA Retry Attempts = 2
- Wait Before Bsy Retrys = 1
- Wait Before RNA Retry = 1

## Adding a Customer's Mobile Text Message Address

**Customer Manager**

**General** | Advanced

\* First Name: SHELIA \* Last Name: FLAMENGO

Address: 93 WOODBINE STREET City: Danbury

State: CT Zip: 02798

Family Members: [ ]

Phone #: (203) 223-2138  Reminder

Alt. Phone #: [ ]  Reminder

Email Address: sheflame@aol.com  Reminder

Text Message: Double click for Text Messaging Wizard  Reminder

**Text Messaging Wizard**

Enter 10 digit Cell Phone Number: 203-223-2138

Select Cell Provider:

- Alltel
- ATT Wireless
- Bell Mobility
- Boost Mobile
- Century Tel
- Cingular (1)
- Cingular (2)
- Fido/Microcell
- Metrocall
- Nextel
- Rogers
- Sprint PCS
- Telus Mobility
- T-Mobile
- Verizon
- Virgin Mobile USA

\*All Company names above are the property of their respective owners and the address strings provided are for programming assistance only. CTL claims no responsibility if the strings are changed.

**Customer Manager**

\* Required Fields

Search Clear Entry

Enable "Notify Now" Cancel "Notify Now"

By Email/Text  By Phone

Customer Notes:  
Shelia is allergic to aspirin.

Text Message: 2032232138@mmode.com  Reminder

Delete	First Name	Last Name	Address	City	State
<input type="checkbox"/>	STEVE	FLAHERTY	930 WOOD...	Danbury	CT
<input type="checkbox"/>	SHELIA	FLAMENGO	93 WOODBI...	Danbury	CT
<input type="checkbox"/>	LISA	FLAMMIA			
<input type="checkbox"/>	MICHELLE	FLAMMIA			

Total 8185

A mobile phone text message address can be automatically calculated in the Text Message Address field.

If you move the mouse pointer over the Text Message Address field, a tool tips bubble will appear.

Double clicking on this field will produce a convenient mobile service provider list.

Enter the 10 digit mobile phone number.

Click the proper cell provider and then click the Convert to address button.

The mobile text address will now appear in the Text Message Address field.

Click the Text Message Reminder box.

**Figure 25** Adding a Cell Phone Text Message Address

## Dial Menu For Recording Notification Voice Messages

All necessary callout messages should have been recorded during the initial installation of the Confirm-IT2 system.

The following information is included for understanding how Confirm-IT2 works.

**If any changes are required to the voice message recordings, you should contact your system administrator or the system installer.**

Voice announcements to be played to the customer **MUST BE RECORDED** prior to enabling the various notifications. This procedure was covered in the **“Using The PC GUI To Recording Notification Voice Messages”** and also in the following **“Recording Messages via Telephone User Interface (TUI)”** section of this manual.

- **Voice Announcement Recordings (via telephone user interface) For:**
  - Appointment Reminder
  - Appointment Cancellation
  - Birthday Message
  - Business Closed Message
  - Inactive Customer Message
  - Confirmed Response Message (option)
  - Cancelled Response Message (option)
  - Answering Machine Announcement
  - Reschedule Reminder
  - Notify Now

As previously discussed in the Callout Options, Confirm-IT2 can do more than just remind customers of their scheduled appointment by calling and playing a reminder message and/or sending cellular text messages and Email.

Confirm-IT2 can:

7. Notify customers that their appointment is cancelled due to a personnel problem.
8. Notify all customers of business closure due to weather etc.
9. Send a reminder for a client to call in to schedule a follow-up appointment.
10. Send a birthday message (with special offer) to customers.
11. Send a “we miss you” message to customers that you have not seen for a while.

In order to use the basic appointment reminder and the other features listed above, a voice message must be recorded by the administrator for each of the message types listed above. These voice messages are recorded using a conventional telephone line to access the **Telephone User Interface (TUI)**. After calling in and connecting to the Confirm-IT2 TUI, a prompt menu will provide dial pad digit selectable choices and guide you through the different voice recording steps.

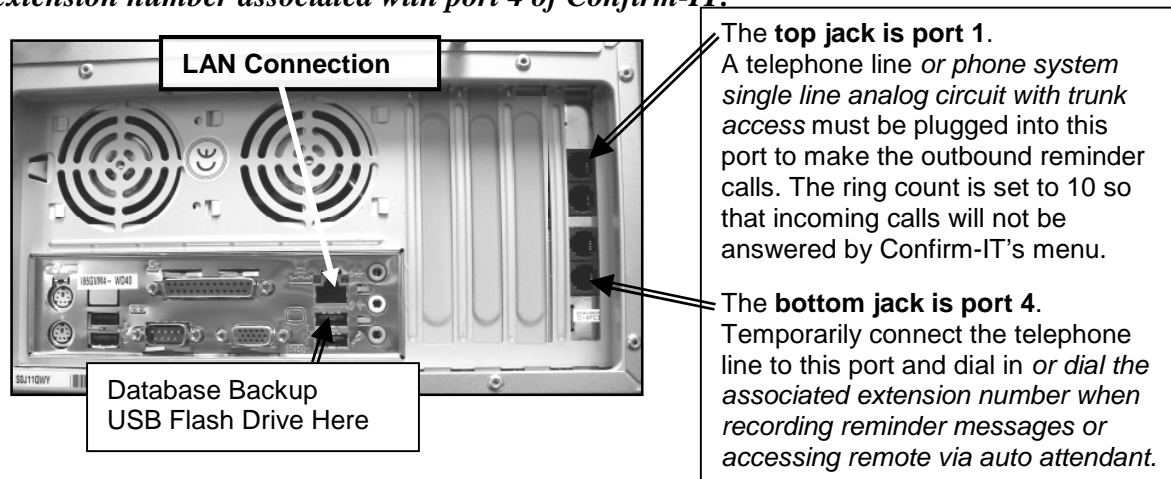
### **Recording Messages via Telephone User Interface (TUI)**

**ANY MODIFICATIONS TO THE CONFIRM-IT2 SERVER PC SHOULD ONLY BE DONE BY AUTHORIZED INSTALLATION PERSONNEL .**

**This information is included for informational purposes only.**

To access the TUI, you must call into one of the Confirm-IT2 telephone interface card ports. In the basic system, there are 4 ports with modular jack connectors located on the back of the Confirm-IT2 server computer.

Port 4 (bottom connector) has been factory programmed to answer after 2 rings and connect to the reminder message administration menu. To record the reminder messages, the telephone company line circuit should be connected to port 4 (bottom connector). *If you are connecting the server to an existing phone system's single line ports, dial the extension number associated with port 4 of Confirm-IT.*



From a phone, call into the Confirm-IT2 server port 4 by dialing the phone number associated with that line. After 2 rings, the call will be answered and you will hear the Confirm-IT2 welcome prompt asking for your password and then press pound (#). **The factory set password is 2663476.** (spells "CONFIRM" on dial pad)

A menu of different message types will be heard. Depending on the message type, it will require either a one or two part recording. The recording option menu will allow you to listen to each part individually. When both parts of a 2 part message have been recorded, both parts can be played together to hear what the actual whole message sounds like. You can review and re-record over existing messages

The messages that need to be recorded are:

- Appointment Reminder** – There can be 3 types of appointment reminder messages *Reminder Message, Date Appointment Message* and *Time Range Appointment Message*. Each type is a **2 part message**. The **first part** identifies the business name with the date and time of the appointment. The wording for the **second part will vary** depending on if the *Appointment Confirm Feature* or *Transfer*

*Feature* to phone system extension by dialing “0” options have been enabled in the **Callout Options** screen or if you offer the **Cancel Appointment** option. (see [Figure 17](#))

The Confirm-IT2 Telephone User Interface Tree in [Figure 24](#) is a graphical illustration showing how to navigate through the message recording process.

◆ **Appointment Reminder Call Answered Message**

A two part message:

Example – Part 1 = “**Hello, this is ABC company calling to remind you of your appointment on..**” DD/MM HH/MM. (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).

Example- Part 2 (no confirmation feature) = “**To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (confirmation feature enabled) = “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (confirmation but no cancel option choice) = “**To confirm your appointment press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”

◆ **Confirm Response– A one part message:**

Example – “**Thank you, your appointment has been confirmed.**”

◆ **Cancel Response – A one part message:**

Example – “**Your appointment has been cancelled. Please call us at 555-1212 to reschedule.**”

◆ **Answering Machine – A two part message:**

Example – Part 1 = ““**Hello, this is ABC company calling to remind you of your appointment on..**” DD/MM HH/MM.” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).

Example – Part 2 = “**If you need to cancel or change this appointment, call us at 555-1212.**”

□ **DATE APPOINTMENT Call Answered MESSAGE**

A two part message:

Example – Part 1 = “**Hello, this is ABC company calling to remind you of your appointment on..**” DD/MM. (the DD/MM day & month is spoken by the system and should not be part of the recording).

Example- Part 2 (*no confirmation feature*) = “**To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation feature enabled*) = “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation but no cancel option choice*) = “**To confirm your appointment press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”

- ◆ **Confirm Response**– A one part message:

Example – “**Thank you, your appointment has been confirmed.**”

- ◆ **Cancel Response** – A one part message:

Example – “**Your appointment has been cancelled. Please call us at 555-1212 to reschedule.**”

- ◆ **Answering Machine** – A two part message:

Example – Part 1 = “**“Hello, this is ABC company calling to remind you of your appointment on..” DD/MM HH/MM.**” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).

Example – Part 2 = “**If you need to cancel or change this appointment, call us at 555-1212.**”

### □ **TIME RANGE APPOINTMENT MESSAGE**

A two part message:

Example – Part 1 = “**“Hello, this is ABC company calling to remind you of your appointment on..” DD/MM from HH/MM to HH/MM.**” (the DD/MM day & month and HH/MM to HH/MM time of day is spoken by the system and should not be part of the recording).

Example- Part 2 (*no confirmation feature*) = “**To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation feature enabled*) = “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation but no cancel option choice*) = “**To confirm your appointment press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”

- ◆ **Confirm Response**– A one part message:

Example – “**Thank you, your appointment has been confirmed.**”

- ◆ **Cancel Response** – A one part message:  
Example – “**Your appointment has been cancelled. Please call us at 555-1212 to reschedule.**”
- ◆ **Answering Machine** – A two part message:  
Example – Part 1 = “**Hello, this is ABC company calling to remind you of your appointment on.. DD/MM HH/MM.**” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).  
Example – Part 2 = “**If you need to cancel or change this appointment, call us at 555-1212.**”
- **APPOINTMENT CANCELLATION** – A two part message:  
Example – Part 1 = “**Hello, this is ABC company calling. Due to an appointment conflict, we are forced to cancel your existing appointment on.. DD/MM HH/MM.**” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).  
Example – Part 2 = “**To reschedule your appointment please contact us at 555-1212.**”
- **NOTIFY NOW CALL ANSWERED MESSAGE**  
A two part message:  
Example – Part 1 = “**Hello, this is ABC company calling to remind you that you may pick up your pet before 5 PM today.**”  
Example- Part 2 (no confirmation feature) = “**If are not able to pick up your pet today, press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”  
Example – Part 2 (confirmation feature enabled) = “**If you will be picking up your pet today, press 1. If are not able to pick up your pet today, press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”  
Example – Part 2 (confirmation but no cancel option choice) = “**If you will be picking up your pet today, press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”
- ◆ **Confirm Response**– A one part message:  
Example – “**Thank you. We look forward to seeing you before 5 PM today**”
- ◆ **Cancel Response** – A one part message:  
Example – “**Please call our office at 555-1212 to let us know when you plan to pick up your pet.**”
- ◆ **Answering Machine** – A two part message:  
Example – Part 1 = “**Hello, this is ABC company calling to remind you that you may pick up your pet before 5 PM today.**”

Example – Part 2 = “**If you have any questions, please call us at 555-1212.**”

- ❑ **RESCHEDULE REMINDER MESSAGE** – A one part message:  
Example – “**Hello, this is ABC company calling to remind you that your pet is due for checkup. Please call 555-1212 to schedule an appointment.**”
- ❑ **BIRTHDAY MESSAGE** – A one part message:  
Example – “**This is ABC company wishing you a happy birthday. Please stop in and get 10% off.**”
- ❑ **BUSINESS CLOSED (To Customers)** – A two part message:  
Example – Part 1 = “**Hello, this is ABC company notifying you that due to bad weather we are closed and must cancel your appointment on..**” *DD/MM HH/MM*. (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).  
  
Example – Part 2 = “**To reschedule your appointment please call us tomorrow at 555-1212.**”
- ❑ **BUSINESS CLOSED (To Provider Staff)** – A one part message:  
Example – “**Hello, this is Amy. Due to the weather, there is no need to come into work today. All appointments have been cancelled.**”
- ❑ **INACTIVE CUSTOMER** – A one part message:  
Example – “**Hello, this is ABC company. We haven’t seen you for a while and miss you. Please stop in and see our new line of products**”.

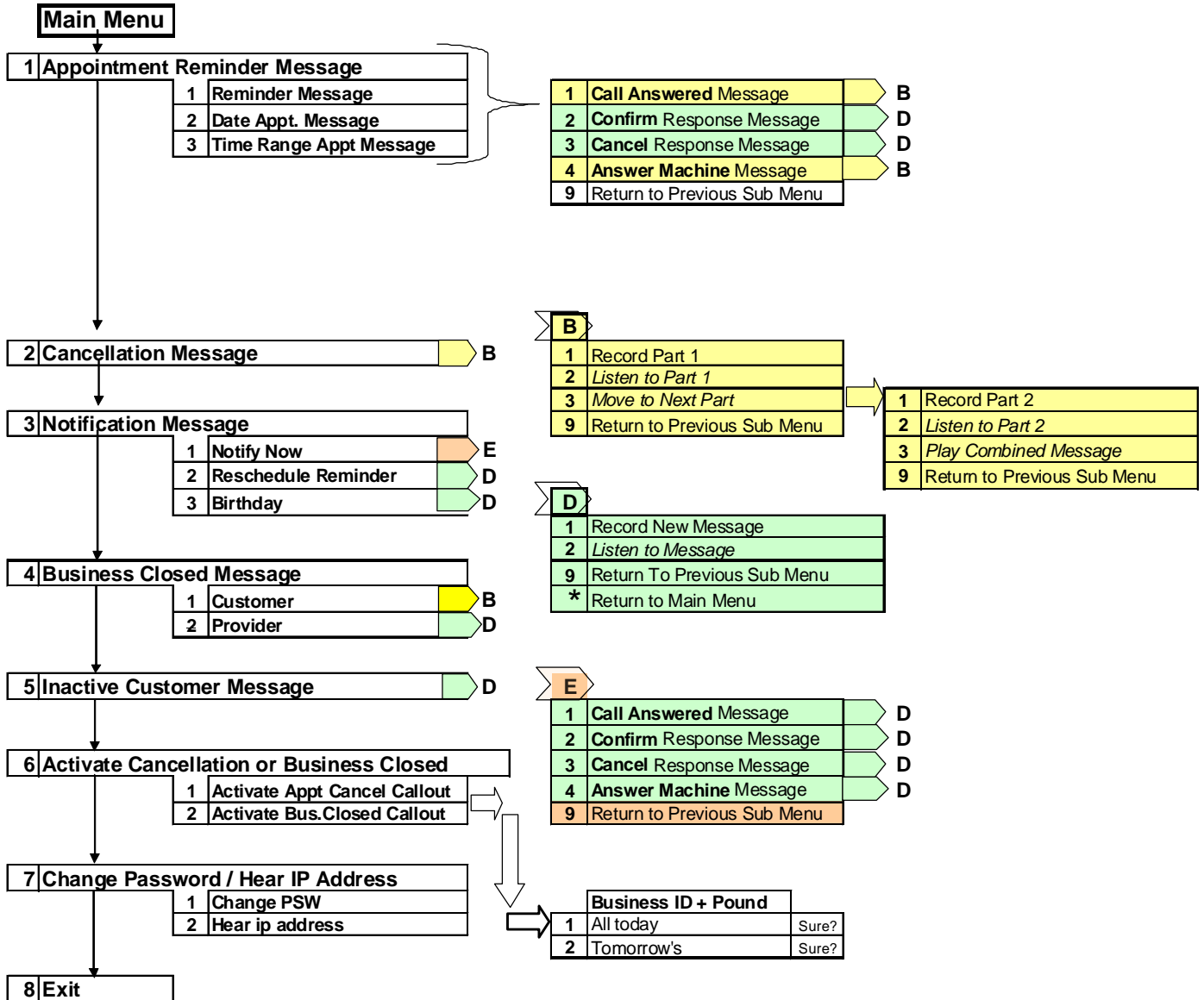
**NOTE: If a direct telephone company line is being used, after recording all of the messages, be sure to remove the modular telephone line plug from port 4 bottom connector and move it back to the out calling port 1 top connector on the rear of the Confirm-IT2 server PC.**

The Telephone User Interface is also used to activate cancellation callouts from a remote location. As mentioned earlier, in the system administration advanced options, port 1 *in rings* is set to 10 and a port answer delay of 40 seconds. It will answer after 10 rings and start playing the menu 40 seconds later. If there is no answering device or after hours intercept, you can call into port 1 of Confirm-IT to access the TUI Administration menu. *If a phone system analog circuit is connected to port 4, you can access the extension number via the phone system or auto attendant.*

If the business location has more than 1 telephone line, *or has a phone system with available analog ports*, the other Confirm-IT ports can be used for out dialing or to dial into. The Port Administration screen of the Confirm-IT Server can be accessed from a Web Browser of a PC on the local area network.

The following diagram shows the dial menu tree for navigating the TUI.

## Confirm-IT2 Telephone User Interface Administration Menu



G:\Final Docs\Recent Work\CI Admin TUI Menu2\_23\_09.xls

To access the Confirm-IT Telephone User Interface (TUI) Main Menu:  
 1. Dial the phone number of telephone line connected to port 1. \_\_\_\_\_  
 2. After 10 rings, the port will answer and ask for your security code.  
 3. Press the dial pad digits 2 6 6 3 4 7 6 and then press the pound key (#). 2663476#  
 4. Select the desired feature choice by pressing the associated digit.  
 You may return to the main menu at any time by pressing the star key (\*)

**Figure 26 Telephone User Interface Menu Tree**

### Sample Reception Desk Notice To Clients

The last page of this manual contains a sample notice for the clients to read when visiting the business where Confirm-IT2 is installed. The “NOTICE TO OUR CLIENTS” explains the new appointment reminder feature and requests their feedback or any special reminder related requests.

It is suggested that this sample or one similar be placed in plain view where the clients can see it.

### Patient Consent Form for Medical (HIPAA)

If the *Confirm-IT2 Medical* application is installed to remind patients of their appointments, a Health Insurance Portability and Accountability Act (HIPAA) consent form must be signed by each patient for permission to send automated appointment reminders. A copy of a sample form is included in *Appendix A* of this manual. Paragraph 2 of this form pertains to appointment reminders to patients. It is the responsibility of the medical service provider to have a signed HIPAA consent form for each patient entered in the Confirm-IT2 database. **CTL, Inc. will not be responsible for any HIPAA violations.**

### *Technical Support & Sales Support*

Visit [www.ctlinc.com](http://www.ctlinc.com) for the latest technical update information. Technical Support questions should be addressed to the company that installed your Confirm-IT2 system.

CTL Inc. 375 Bridgeport Ave Shelton, CT 06484 203-925-4266

# NOTICE TO OUR CLIENTS

We have recently installed an advanced appointment confirmation system. To maximize its capabilities and to make it the most effective for you, we need your feedback regarding your appointment confirmation. As you may have already experienced, the system allows us to confirm your appointment the day before it is scheduled and remind you with a phone call and/or an email/text message. Our intention is to simply remind you of your appointment. **If you do not receive an appointment reminder or wish to change how, when or where we contact you,** please advise our receptionist so we can make the necessary changes. Thank you.

## APENDIX A

### ***HIPAA Information and Consent Form***

The Health Insurance Portability and Accountability Act (HIPAA) provides safeguards to protect your privacy. Implementation of HIPAA requirements officially began on April 14, 2003. Many of the policies have been *our* practice for years. This form is a “friendly” version. A more complete text is posted in the office.

What this is all about: Specifically, there are rules and restrictions on who may see or be notified of your Protected Health Information (PHI). These restrictions do not include the normal interchange of information necessary to provide you with office services. HIPAA provides certain rights and protections to you as the patient. We balance these needs with our goal of providing you with quality professional service and care. Additional information is available from the U.S. Department of Health and Human Services. [www.hhs.gov](http://www.hhs.gov)

We have adopted the following policies:

1. Patient information will be kept confidential except as is necessary to provide services or to ensure that all administrative matters related to your care are handled appropriately. This specifically includes the sharing of information with other healthcare providers, laboratories, health insurance payers as is necessary and appropriate for your care. Patient files may be stored in open file racks and will not contain any coding which identifies a patient's condition or information which is not already a matter of public record. The normal course of providing care means that such records may be left, at least temporarily, in administrative areas such as the front office, examination room, etc. Those records will not be available to persons other than office staff . You agree to the normal procedures utilized within the office for the handling of charts, patient records, PHI and other documents or information.
2. It is the policy of this office to remind patients of their appointments. We may do this by telephone, e-mail, U.S mail, or by any means convenient for the practice and/or as requested by you. We may send you other communications informing you of changes to office policy and new technology that you might find valuable or informative.
3. The practice utilizes a number of vendors in the conduct of business. These vendors may have access to PHI but must agree to abide by the confidentiality rules of HIPAA.
4. You understand and agree to inspections of the office and review of documents which may include PHI by government agencies or insurance payers in normal performance of their duties.
5. You agree to bring any concerns or complaints regarding privacy to the attention of the office manger or the doctor.
6. Your confidential information will not be used for the purposes of marketing or advertising of products, goods or services.
7. We agree to provide patients with access to their records in accordance with state and federal laws.
8. We may change, add, delete or modify any of these provisions to better serve the needs of the both the practice and the patient.
9. You have the right to request restrictions in the use of your protected health information and to request change in certain policies used within the office concerning your PHI. However, we are not obligated to alter internal policies to conform to your request.

**I, \_\_\_\_\_ date \_\_\_\_\_ do hereby consent and acknowledge my agreement to the terms set forth in the HIPAA INFORMATION FORM and any subsequent changes in office policy. I understand that this consent shall remain in force from this time forward.**